



FOIAonline Training

December 2017

Agenda – FOIAonline Training



- Terms & Definitions
- Role Explanations
- Introduction/User Credentials
- Look and Feel Overview
- Submission
- Evaluation
- Assignment
- Processing
- Close Out
- Advanced Topics

Terms & Acronyms

Module 1



- **Action Menu:** The list of actions available at any particular moment which displays on the left column of every page.
- **Button:** An object that can be clicked to save, complete, or cancel actions taken on the page. Buttons are green with white text throughout the system.
- **Dashboards**
 - My Cases: Available to all agency users. It collates all requests, appeals, tasks, referrals, and consultations which are assigned to the currently logged in user.
 - Unassigned Cases: The landing page for agency users who are responsible for distributing materials throughout the system. It collates all materials which are assigned to the currently logged in user's organization.
 - Assigned Cases: Available to agency users who are responsible for distributing materials throughout the system. It collates all materials which are assigned to organizations or individuals below the currently logged in user within the organizational hierarchy.
- **Switchboard:** A user who operates as a distributor of items throughout the system.
- **Tab:** Used throughout the system to access new pages. The active tab is white with black text, while inactive tabs are blue with white text.
- **Task:** Used to facilitate access to a request, appeal, or referral for users other than the individual assigned to the request, appeal, or referral.

Terms & Acronyms

Module 1



My Cases

Unassigned Cases

Assigned Cases

Request Details

Make Assignment

Estimate Costs

Stop the Clock

Extend Due Date

Create Task

Upload Responsive Records

Create Correspondence

Create Comment

Create Consultation

Create Referral

Create Appeal

Interim Release

Transfer Request

Export Request

Request Details

Status : Research Records

Due Date : 09/17/2014

Submitted

Evaluation

Assignment

Processing

Closed

Tracking Number : EPA-HQ-2014-000419

Submitted Date : 08/19/2014

Requester : Registered Requester

Perfected Date : 08/19/2014

Organization : N/A

Last Assigned Date : 08/19/2014

Requester Has Account : Yes

Fee Limit : \$25.00

Submission Details

Case File

Admin Cost

Assigned Tasks

Comments (0)

Review

Request Handling

Requester Info : Yes

Request Perfected : Yes

Available to the Public :

Perfected Date : 08/19/2014

Request Track : Complex

Acknowledgement Sent

Date:

Unusual

No

stances ? :

ifications:

itigation : No

Action Menu:

The list of actions available at any particular moment which displays on the left column of every page.

Terms & Acronyms

Module 1



Request Description

? Short Description :

FOIA request.

? Description Available to the Public : Has Description Been Modified? ☐

Attached Supporting Files

No supporting files have been added.

Upload Supporting Files

No file selected.

No attachments have been added.

Button:

An object that can be clicked to save, complete, or cancel actions taken on the page. Buttons are green with white text throughout the system.

Terms & Acronyms

Module 1



[Home](#)[Search](#)[Reports](#)[Administration](#)[My Account](#)

[My Cases](#)
[Unassigned Cases](#)
[Assigned Cases](#)

[New Request](#)
[New Consultation](#)
[New Referral](#)

My Cases

Filter **All** Results **25**

55 items found, displaying 1 to 25.

Tracking Number	Type	Track	Requester	Assigned	Due	Status	Detail
EPA-HQ-2014-000419	Request	Complex	Registered Requester	08/19/2014	09/17/2014	Research Records	
FOIA request.							
EPA-2014-000064	Task	Simple	Samantha Thomas	08/06/2014	TBD	Research Records	
EPA-R7-2014-000285	Task	Simple	Jane Doe	07/16/2014	TBD	Final Preparation of Response	
Case File Review							
			Thomas Marks	06/20/2014	TBD	Final Preparation of Response	
			Thomas Doe	06/19/2014	TBD	Final Preparation of Response	

My Cases Dashboard:

Available to all agency users. It collates all requests, appeals, tasks, referrals, and consultations which are assigned to the currently logged in user.

Terms & Acronyms

Module 1



[Home](#)[Search](#)[Reports](#)[Administration](#)[My Account](#)

[My Cases](#)

[Unassigned Cases](#)[Assigned Cases](#)

[New Request](#)[New Consultation](#)[New Referral](#)

Unassigned CasesAgency Filter Results

25 items found, displaying all items.

1

Assign	Tracking Number	Type	Requester	Submitted	Due	Detail
<input type="checkbox"/>	EPA-HQ-2014-000334	Request	Jane Doe	07/29/2014	TBD	▶
<input type="checkbox"/>	EPA-HQ-2014-000324	Task	Jane Doe	07/29/2014	TBD	▶
Interim Release Notice						
<input type="checkbox"/>	EPA-HQ-2014-000324	Request	Jane Doe	07/24/2014	08/26/2014	▶
<input type="checkbox"/>	EPA-HQ-2014-000315	Request	Justin Roberts	07/14/2014	08/12/2014	▶
Please send me all records associated with GSA processing.						
<input type="checkbox"/>	EPA-HQ-2014-000247	Task	Ben Barker	07/08/2014	TBD	▶
<input type="checkbox"/>	EPA-HQ-2014-000316		Pick Smith	07/02/2014	08/07/2014	▶
				06/16/2014	07/29/2014	▶

Unassigned Cases Dashboard:

The landing page for agency users who are responsible for distributing materials throughout the system. It collates all materials which are assigned to the currently logged in user's organization.

Terms & Acronyms

Module 1



[Home](#)[Search](#)[Reports](#)[Administration](#)[My Account](#)

[My Cases](#)[Unassigned Cases](#)[Assigned Cases](#)[New Request](#)[New Consultation](#)[New Referral](#)

Assigned Cases

Filter **All** Results **25**

270 items found, displaying 1 to 25.

Tracking Number	Type	Requester	Requester Organization	Submitted	Assigned To	Due	Detail
EPA-HQ-2013-002042	Request	Sammy Orlando	N/A	08/19/2013	Vivian Maxwell	01/15/2014	
I'm looking for records associated with the superfund site at the above listed address.							
EPA-HQ-2014-000443	Request	Estimating Costs	N/A	09/10/2014	Jennifer Oxford	TBD	
EPA-HQ-2014-000441	Request	Testing Clock	N/A	09/08/2014	Jennifer Oxford	10/06/2014	
	Request	Registered	N/A	09/02/2014	ORD	TBD	
				02/2014	Jennifer Oxford	TBD	

Assigned Cases Dashboard:

Available to agency users who are responsible for distributing materials throughout the system. It collates all materials which are assigned to organizations or individuals below the currently logged in user within the organizational hierarchy.

Terms & Acronyms

Module 1



Assign	Tracking Number	Type	Requester	Submitted	Due	Detail
<input type="checkbox"/>	EPA-HQ-2014-000423	Task	Registered Requester	09/12/2014	TBD	▶
<input type="checkbox"/>	EPA-HQ-2014-000334	Request	Jane Doe	07/29/2014	TBD	▶
<input type="checkbox"/>	EPA-HQ-2014-000324	Task	Jane Doe	07/29/2014	TBD	▶
<input type="checkbox"/>	EPA-HQ-2014-000324	Request	Jane Doe	07/24/2014	08/26/2014	▶
<input type="checkbox"/>	EPA-HQ-2014-000315	Request	Justin Roberts	07/14/2014	08/12/2014	▶
<input type="checkbox"/>	EPA-HQ-2014-000247	Task	Ben Barker	07/08/2014	TBD	▶
<input type="checkbox"/>	EPA-HQ-2014-000316	Request	Rick Smith	07/02/2014	08/07/2014	▶
<input type="checkbox"/>	EPA-HQ-2014-000252	Request	Lauren Taylor	06/16/2014	07/29/2014	▶
<input type="checkbox"/>	EPA-HQ-2014-000251	Request	Lauren Cooper	06/16/2014	08/29/2014	▶
<input type="checkbox"/>	EPA-HQ-2014-000246	Request	Ben Cooper	06/16/2014	07/29/2014	▶

26 items found, displaying 1 to 10.

[1](#) [2](#) [3](#) [▶](#) [▶](#)

Export options: [CSV](#) | [Excel](#)

Switchboard:

A user who operates as a distributor of items throughout the system.

Make Assignment

Note: Depending on the number of items being assigned, assignments may not be made immediately after saving.

Organization Assignment : 

Individual Assignment : 

Assignment Comments :

SAVE CHANGES

ASSIGN TO ME

Terms & Acronyms

Module 1



Tab:
Used throughout the system to access new pages. The active tab is white with black text, while inactive tabs are blue with white text.

The screenshot displays the FOIAonline web application interface. At the top, a navigation bar contains tabs: Home, Search, Reports, Administration, and My Account. The 'Search' tab is active, highlighted with a blue background and white text. To the right of these tabs is a search bar labeled 'Search FOIA requests...'. Below the navigation bar, the 'Request Details' section shows the status as 'Research Records' and the due date as '08/23/2013'. A progress bar indicates the stages: Evaluation, Assignment, Processing (current), and Closed. Below this, a timeline shows the submitted date (07/24/2013), perfected date (07/26/2013), last assigned date (06/05/2014), and fee limit (\$25.00). A blue arrow points from the 'Tab' definition box to the 'Search' tab. Another blue arrow points from the 'Tab' definition box to the 'Case Details' section. The 'Case Details' section includes a direct URL, case type (FOIA), fiscal year (2013), total days pending (55), received date (07/24/2013), and clock initially started on (07/26/2013). Below this, a row of tabs includes Submission Details, Case File, Admin Cost, Assigned Tasks, Comments (1), and Review. The 'Case File' tab is active. At the bottom, a row of tabs includes Records, Consultations, Correspondence, Appeals, Financing, and Restricted Materials. The 'Records' tab is active. The 'Case Responsive Records' section lists publish options: UU - Unredacted - Unreleasable, RU - Redacted - Unreleasable, UR - Unredacted - Releasable, RR - Redacted - Releasable, and REQ - Release to Requester Only.

Home Search Reports Administration My Account Search FOIA requests...

My Cases
Unassigned Cases

Request Details

Status : Research Records Due Date : 08/23/2013

55

Evaluation Assignment Processing Closed

013-002036
atasha Wyatt

Submitted Date : 07/24/2013
Perfected Date : 07/26/2013
Last Assigned Date : 06/05/2014
Fee Limit : \$25.00

Extend Due Date
Create Task
Upload Responsive Records
Create Correspondence
Create Comment
Create Consultation
Create Referral
Create Appeal

Submission Details Case File Admin Cost Assigned Tasks Comments (1) Review

Direct URL : <http://ffx-epa-app1.cgifederal.com:8280/foia/action/public/view/request/80035598>

Case Details

Type of Case : FOIA
Fiscal Year : 2013
Total Days Pending : 55

Received Date : 07/24/2013
Clock Initially Started On : 07/26/2013

Records Consultations Correspondence Appeals Financing Restricted Materials

Case Responsive Records

Publish Options : UU - Unredacted - Unreleasable
RU - Redacted - Unreleasable
UR - Unredacted - Releasable
RR - Redacted - Releasable
REQ - Release to Requester Only

Terms & Acronyms

Module 1



Submission Details	Case File	Admin Cost	Assigned Tasks	Comments (1)	Review
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Outcome	Assigned To	Assigned By	Date Sent	Due Date	Closed Date	Notification	Detail
Pending	Maggie Hart	Jennifer Oxford	04/07/2014	<input type="text"/>		<input type="checkbox"/>	
Pending	Maggie Hart	Jennifer Oxford	04/02/2014	<input type="text"/>		<input type="checkbox"/>	
Pending	Julie Matthews	Jennifer Oxford	03/04/2014	<input type="text"/>		<input type="checkbox"/>	
Records Uploaded	Jennifer Oxford	Jennifer Oxford	02/19/2014	02/21/2014	02/19/2014	<input type="checkbox"/>	
<p><i>Description</i> : Please search for responsive records.</p> <p><i>Comments</i> : Uploaded X, Y, and Z records to the case file. Searched A, B, and C files.</p>							
Other	Jennifer Oxford	Jennifer Oxford	01/15/2014	01/16/2014	01/15/2014	<input type="checkbox"/>	
Pending	Jennifer Oxford	Jennifer Oxford	12/11/2013	12/18/2013		<input type="checkbox"/>	
Pending	Jennifer Oxford	Jennifer Oxford	12/11/2013	12/18/2013		<input type="checkbox"/>	
Partial Grant	HQ	Jennifer Oxford	10/21/2013		12/03/2013	<input type="checkbox"/>	

Task:

Used to facilitate access to a request, appeal, or referral for users other than the individual assigned to the request, appeal, or referral.

SAVE CHANGES

UPDATE NOTIFICATIONS

Roles Defined

Module 2



- Each of you is given at least one role
 - Some of you are the National Team – the highest role
 - Some of you are Coordinators for an office– full access across the office
- Roles give you access to your part of the organizational chart AND below
 - Your office
 - Offices within your office
 - Offices within offices below yours
 - ...and so on
- Two factors determine the role you are given
 - Do you act on behalf of the entire agency, an entire office, or within office?
 - Do you manage work assignments?

Roles Defined

Module 2



What is a
role?

My job is...	I am typically a...	This allows me to...
In the National FOIA Office , receiving requests and routing them across the Agency.	National Team role at the highest level of the organizational chart.	<ul style="list-style-type: none">• View and edit any open FOIA request across my agency.• Assign any item to anywhere or anyone in the Agency• Approve items such as extensions• Backdate offline closures• Reopen any case across the agency
Within an office , leading FOIA processing, possibly as a FOIA Officer.	Coordinator role at the office in which I work.	<ul style="list-style-type: none">• View and edit any open FOIA request across my office.• Assign any item to anywhere or anyone in my office OR to another office• Approve items such as extensions• Backdate offline closures

Roles Defined

Module 2



What is a
role?

My job is...	I am typically a...	This allows me to...
In a Branch or Division within an office, acting as the FOIA Lead for my office.	Public Liaison	<ul style="list-style-type: none">• View and edit any open FOIA request across my Branch/Division.• Assign any item to anywhere or anyone in my Branch/Division OR to another Branch/Division at my level in the organizational chart
In a Branch or Division within an office, processing FOIA requests that are assigned to me.	Professional -or- SME	<ul style="list-style-type: none">• View and edit any open FOIA request that is assigned to me.

Roles Defined

Module 2



What is a
role?

My job is...	I am typically a...	This allows me to...
In an Appeal Processing Unit such as an OGC, processing Appeals for the Agency.	Public Liaison AND Reviewer	<ul style="list-style-type: none">• Get Appeals automatically assigned to my office upon creation.• View and edit any open Appeals assigned to my office.• View any FOIA request across the Agency

Roles – Switchboards

Module 2



National Team Role

(Switchboard, WITH Admin rights)

Coordinator Role

(Switchboard, WITH Admin rights)

Public Liaison Role

(Switchboard, WITHOUT Admin rights)



Each of these offices identifies a small group of people to get one of FOIAonline's "switchboard" roles to be able to route requests.





- *National Team – Oversees all of agency including administrative functions*
- *Coordinator – Oversees an entire office, including administrative functions*
- *Public Liaison – Oversees an office within an office, with no administrative functions*

Roles – Switchboards

Module 2



- The only roles who can assign requests and task are switchboard roles
 - National Team
 - Coordinators
 - Public Liaisons
- Now, where can these people assign items?
 - Imagine the organizational chart
 - Think of where you sit – where you act on behalf of
 - Use the table at the right to help you

Which Offices can I assign to?	Which Individuals can I assign to?
Look Left 	
Look Right 	
Look Up 	
Look Down 	Look Down 